NOVA SCOTIA
Tourism Partnership
COUNCIL

2001 Report Card

Tourism Partnership Council

2001 Report Card

Our vision:

"Realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians"

December 2001

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Table of Contents

Chair's message 3

Minister's message 4

Tourism Industry Profile 6

Nova Scotia Integrated Tourism Plan 2002 9

The Nova Scotia Tourism Strategy 10

Marketing Committee 12
- Measuring the success of our marketing efforts 13
- 2002 Annual Marketing Plan Task Force 14
- Travel Trade Task Force 16
- Meetings, Conventions & Incentive Travel (MC&IT) Task Force 17
- E-Marketing Task Force 18
- E-Marketing Committee 20
- Strength in Partnership 21
- Tour Operator Partnership Program 23
- Destination Marketing Program 24

Product Development Committee 26

Vision Committee 29
- Tourism Strategy Implementation Committee 30

Executive Committee 31
- Selection Committee 32
- Integrated Resource Management (IRM) Task Force 32
- Visitor Information Services (VIS) Task Force 33

Policy Committee 36

Challenges for the Future 38

2002 Priorities 39

Who are we — a brief overview 45

2001 Tourism Partnership Council Members 46

Tourism Division Staff 48

Publications 49

Contacting the Council 50

Chair's message

As Chair of the Tourism Partnership Council, it is my pleasure to outline the accomplishments of the Council in its third year of operation. Together with industry operators and government, our team is committed to ensuring we continue to realize our tourism potential.

This report card is prepared as part of our accountability to industry and government. It highlights this year's achievements, including the results of the Council's 2001 Marketing Plan, and our plans for the year ahead and beyond.

For 2002 we have taken an integrated approach which was set out in the Tourism Strategy announced last November. Our overview concentrates on tourism priorities and programs for the coming year using marketing, product development, policy, partnerships and research initiatives, often in combination, to address the six strategic objectives of the Tourism Strategy. Taking a product to market demands a coordinated effort of these areas and the Integrated Tourism Plan for 2002 will combine initiatives from across all business functions to achieve our goals. Our success as an industry is based on our ability to collaborate in the development of new products and opportunities, then market those ideas within a strong strategic framework.

As was intended, our partners continue to contribute where best they can. The private sector continues to contribute to the marketing and development efforts, unilaterally as well as in partnership with the Department of Tourism and Culture. Industry contribution has also included a huge time commitment to the process, and numerous other in-kind contributions. Further, the number of industry volunteers who assist in creating our plans on an annual basis has substantially increased.

Government is supporting our activities through a budget for tourism marketing and product development programs, as well as funding for administrative support. Staff from the Tourism Division have provided invaluable support to our effort, and we thank them for their commitment.

Overall the industry has experienced tremendous growth for many years. And while there have been peaks and valleys, the overall growth trend has been positive. From the Tourism Partnership Council's perspective, we recognize that we didn't meet our ambitious industry targets for 2001. But we're pleased with the performance of our 2001 Marketing Plan. The results of the program give us confidence that the strategic spending of the dollars entrusted to us to promote this destination is paying dividends. We are marketing the right products to the right people, and they are responding.

We trust you'll find this Report Card informative. We also hope you'll join us as we work to strengthen the tourism industry, including increasing resources and investment and addressing the priorities in the Tourism Strategy and the 2002 Integrated Tourism Plan.

Sincerely,

Paul Stackhouse
Chair, Tourism Partnership Council

Minister's message

I am honoured to congratulate the Nova Scotia Tourism Partnership Council on its third year of operation. It is your hard work and perseverance that is behind the great strides this industry has made in identifying and capitalizing on Nova Scotia's strengths.

Once again, the annual impact of this industry is striking with revenues surpassing the $1.2 billion dollar mark and non-resident visitation reaching two million visitors. Our industry is strong and has an impressive impact on the provincial economy. It's estimated that this year's revenue translates into jobs for some 34,000 Nova Scotians with a payroll of more than $470 million. It will also put $115 million dollars worth of taxes into the province and our municipalities.

I am confident our industry will continue to make the most of the opportunities before us - our industry is filled with a spirit of cooperation and shared vision. We see this through the Tourism Partnership Council, through the Tourism Industry Association of Nova Scotia, through our regional tourism organizations, and through our tourism operators.

Cooperation is the hallmark of our successful industry and the results are impressive. This year, the Council has introduced the first ever Integrated Tourism Plan, which combines our annual marketing and product development plans. The integrated plan represents the combined efforts of industry and government and is an excellent example of how we are working together to achieve our mutual goals of making the world feel welcome.

Another great example of industry and government working together is Nova Scotia's Partnership Opportunities book, which was delivered early in the fall. This book is filled with numerous ways businesses can benefit from Nova Scotia's multi-million dollar marketing program and I hope you will seize the opportunities presented.

Let me conclude with the acknowledgment that this is an industry that knows no boundaries, rural or urban. With our new integrated plan, we are well positioned to ensure the growth of this industry. In short, tourism is coming of age as a year round industry that influences the economy across Nova Scotia in many ways -- thanks to our thousands of operators, entrepreneurs, volunteers and the associations throughout this province. On behalf of the province and the people of Nova Scotia, thank you.

Sincerely,

Rodney MacDonald

Rodney MacDonald
Minister
Department of Tourism and Culture

Nova Scotia Tourism Partnership Council activities have been extremely effective in contributing to the growth of tourism — a key economic sector that benefits all Nova Scotians.

A major objective in forming the Council was to enable the private sector to participate in decision making, to better integrate programming with private sector activities, and to drive visitation and revenue growth. The Council has many accomplishments to report.

Highlights Include:

- The first Nova Scotia Integrated Tourism Plan 2002 was unveiled at the Tourism Conference in November. This plan is a new integrated approach, which was set out in Nova Scotia's Tourism Strategy announced in November 2000. Included in this plan is an overview of our tourism priorities and programs for 2002 using marketing, product development, policy, partnerships and research initiatives, often in combination, to address the six strategic objectives of the Tourism Strategy.
- Nova Scotia's Partnership Opportunities 2002 was delivered to industry in October 2001 - earlier than previous years and designed in a more user friendly format for industry partners. The book provides industry with deadlines and costs for our traditional programs, as well as introduces several new ones. The early delivery date gave industry a chance to review the programs prior to the Tourism Conference in November, where the program "contacts" were available to answer questions.
- The Tourism Partnership Council and the Department of Tourism and Culture announced the introduction of TradeSmart – The Travel Trade Supplier Certification Program. Both the overall Tourism Strategy and Product Development Plan focus on ensuring we have a quality, competitive and sustainable tourism product. TradeSmart is a new kind of initiative resulting from the first integrated Tourism Plan.
- Secured dollars from the Atlantic Canada Tourism Partnership (ACTP) to promote the Nova Scotia brand.
- Increased the participation and investment in marketing partnerships by leveraging involvement of new partners.
- Supported regional tourism initiatives with the Destination Marketing Programs.
- Unveiled exploreNS.com in its newly enhanced web site at www.novascotia.com. These enhancements were made with the assistance of the E-Marketing Task Force, stakeholder input received through various consultation forums, as well as direct feedback from online consumers.
- Developed a new product development plan that will ensure the experiences we take to market are, in fact, experiences that our visitors are seeking.
- This year every provincial dollar applied to marketing generated another 52 cents in partnership funding from the private sector and other levels of government.

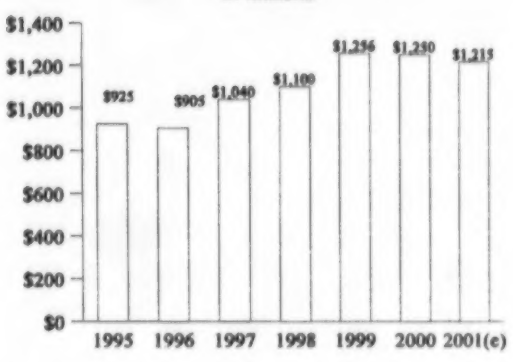
Tourism Industry Profile

How important is tourism?

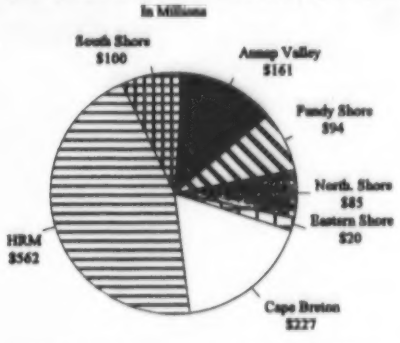
In 2001, it is estimated that the tourism industry in Nova Scotia generated:

- $1.21 billion in direct revenues
- 34,000 direct and indirect jobs
- $476 million in direct and indirect wages and salaries
- $115 million in provincial and municipal taxes

Nova Scotia Tourism Receipts
In Millions



2000 Nova Scotia Tourism Revenues by Region
In Millions



2000 Total Revenues = $1.25 Billion

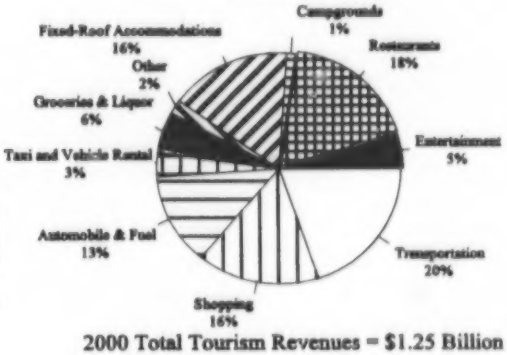
How are revenues shared among the regions?

Both the urban and rural areas of the province benefit from tourism generated revenues. (Nova Scotia's regional tourism revenues for 2001 are not currently available.)

What businesses benefit from tourism?

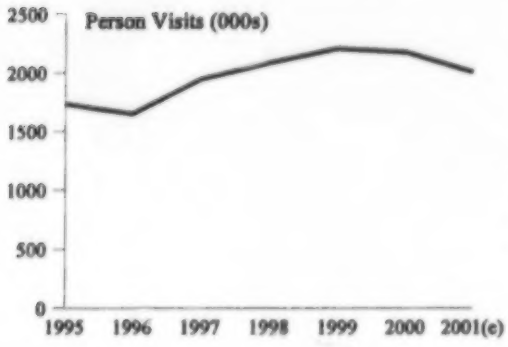
Spending by tourists in Nova Scotia benefits almost all sectors of the Nova Scotia Economy. Since this spending generates tax revenues for the municipal and provincial governments, it also helps to support and maintain our essential services like health care, education, police services, and snow removal.

2000 Nova Scotia Tourism Receipts
By Expenditure Type



2000 Total Tourism Revenues = $1.25 Billion

Visitor Volume To Nova Scotia
January - December, 1995 - 2001



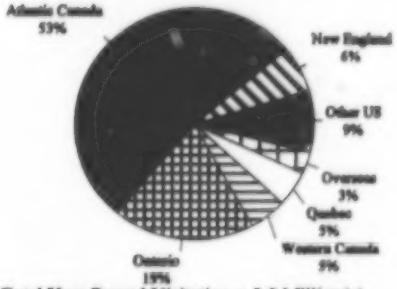
How many people choose Nova Scotia as a travel destination?

For January to the end of December 2001, total overnight, non-resident, visitation to Nova Scotia is estimated to be approximately 2 million people. In addition to visitors from outside the province, Nova Scotians make almost 6 million trips within the province annually, providing significant benefits for the industry.

Who visits Nova Scotia?

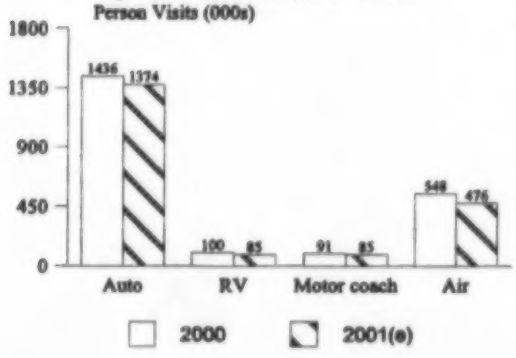
The majority of non-resident visitors to Nova Scotia come from other areas of Atlantic Canada (53%). Visitors from Ontario comprise another 19% and other parts of Canada 9%. The US and overseas visitors also make a significant contribution. In 2001, it is estimated that 15% of our visitors come from the United States, while 3% come from other international markets.

2001(e) Visitation To Nova Scotia
By Region of Origin



Total Year Round Visitation = 2.0 Million(e)

Visitor Volume To Nova Scotia
By Mode of Travel, 2000 - 2001
Person Visits (000s)

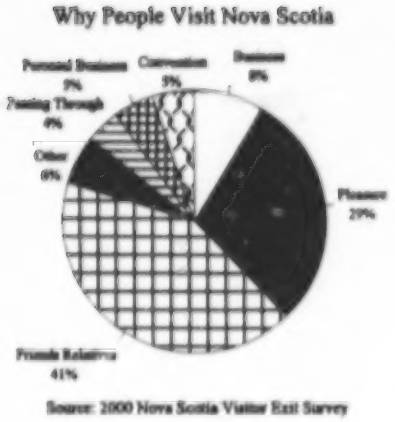


How do they get here?

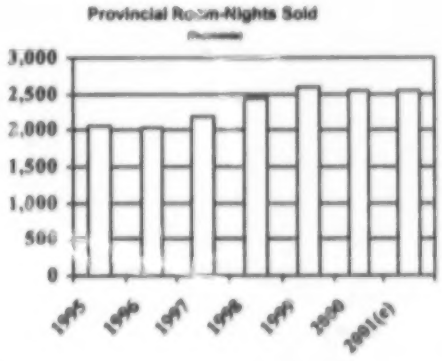
As in the past, most visitors to Nova Scotia travel by car (68%). Air plane (24%), recreational vehicle (4%) and motor coach (4%) account for the remainder. The proportion of visitors arriving by air is expected to decrease by 1% for 2001.

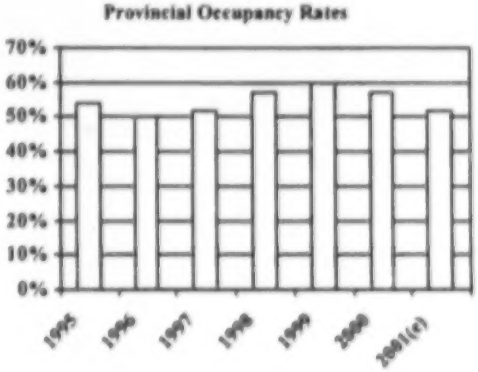
What attracts people to Nova Scotia?

People visit Nova Scotia for many reasons: to take a vacation and enjoy the natural beauty that Nova Scotia offers, to visit friends and relatives, to conduct business, attend conventions, and to take care of personal business.



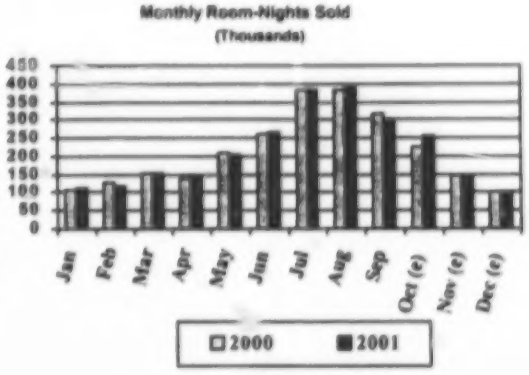
Source: 2000 Nova Scotia Visitor Exit Survey





In 2000, more than 2.5 million room nights were sold in Nova Scotia. This 1% decrease over 1999, began a downward trend in the accommodation sector. The provincial occupancy rate also declined to 57% in 2000 and it is estimated to be 52 % in 2001.

Seasonality continues to be an issue within the tourism industry in Nova Scotia. Despite continuing efforts to make Nova Scotia a four-season destination, the province has a seasonal pattern with visitation steadily growing from January reaching a peak in July and August and steadily declining again to December. One of the objectives of the 2001 Tourism Marketing Plan is to reduce the dramatic fluctuations in room sales by increasing visitation in the shoulder and non-peak seasons.



Nova Scotia Integrated Tourism Plan 2002

Taking a product to market demands a coordinated effort of research, product development, marketing and strategic partnerships. Our success as an industry is based on our ability to collaborate in the development of new products and opportunities, then market those ideas within a strong strategic framework.

The Tourism Partnership Council has taken a new integrated approach to our business, which was set out in Nova Scotia's Tourism Strategy announced last November. We have combined marketing, product development, partnerships, policy and research initiatives, often in combination, to address the six strategic objectives of the Tourism Strategy in one complete plan.

While Nova Scotia's Tourism industry has enjoyed many successes in the past few years, there are challenges that still remain. This new approach will allow better integration of all Tourism Partnership Council functions, and partners to come together as a team to collaborate on new ideas to make Nova Scotia more competitive as a year-round destination.

Our new structure of business integration means that both the marketing and product development functions will work more closely together to create synergies and opportunities for growth. Sustained growth will come as a result of developing ***and*** marketing new products—as well as improving the quality of established attractions, sites and operations.

2002 Strategic Thrusts

Some of the highlights of the 2002 Tourism Plan include:

- Increased efforts to generate more product and revenue in peak season.
- A new creative approach in advertising.
- Creating product initiatives that promote the development of Nova Scotia as an authentic seacoast experience.
- Continuing efforts in Quebec, while closely monitoring and assessing results.
- Increasing focus on meetings and conventions during non-peak times.
- Introducing product development programs that enhance Nova Scotia's culture and heritage experiences.
- Continuing to build on e-marketing success with new programs and promotions.
- Remaining flexible with marketing plans for U.S.A.
- Introducing initiatives that develop Nova Scotia's outdoor nature experiences.
- Training, influencing and advocacy actions.
- Seasonal and quality issues integrated throughout product priorities.

The Nova Scotia Tourism Strategy

Building on success

In 2000, communities, industry and government came together to collaborate on the creation of the current Nova Scotia Tourism Strategy. The plan serves as a guide for everything we do in marketing, product development, policy, research, operations and partnerships.

The Tourism Partnership Council's (TPC) vision and mission are valid starting points for the strategy.

TPC Vision Statement:
"Realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians."

TPC Mission Statement:
"The Nova Scotia Tourism Partnership Council's mission is to grow the tourism industry in the province, increasing the number of tourists that visit Nova Scotia and increasing the amount they spend while in the province."

Based on the vision and mission, three high-level goals have been identified for the Nova Scotia Tourism Strategy :

- ***Industry Growth*** - The strategy is intended to have a direct effect on economic growth for the tourism industry, individual business and the Nova Scotia economy.
- ***Sustainability*** - The strategy focuses on ensuring that the actions taken to grow the industry can be sustained for years to come and the things that are done today will provide a solid basis for long-term economic growth.
- ***Quality of Life*** - As well as generating directly to revenues, tourism contributes economically to the quality of life for all Nova Scotians by providing employment, as well as generating tax revenues to fund health care and education. Tourism also provides infrastructure and recreational facilities which benefit tourists and Nova Scotians.

The Essence of the Strategy

Given our fundamental strength as a seacoast destination, the fact that there is demand for our product strengths and factors that could potentially undermine those strengths, the essence of our strategy is to:

Protect, Develop and Communicate
Our Identity
As a Seacoast Destination

Strategic Objectives
The strategy addresses high-level goals with six strategic objectives grouped in three levels of priorities:

1st Level Priorities

- ***Grow revenues from the touring market*** - Our traditional markets must be further penetrated by enhancing the current marketing approach and encouraging new product development. An immediate focus would be the implementation of a European travel trade strategy to capture return visits. We will also encourage existing visitors to stay in the province longer and spend more money.
- ***Improve the quality, competitiveness and sustainability of our tourism product*** - Build a collaborative approach to enhance quality within the industry, emphasizing communications and standards.

2nd Level Priority

- ***Build a 12-month season*** - Build partnerships between communities and industry to increase shoulder and winter season visitations and spending.

3rd Level Priorities

- ***Develop viable niche markets*** - Strengthen key niches, such as *outdoor nature*, *golf* and *group tours* by creating a product development plan addressing niches. More packaging and marketing initiatives will be created around niches.
- ***Improve transportation access*** - Improve infrastructures to support efficient, convenient transportation.
- ***Improve the business environment for tourism*** - Through policies, plans and partnerships create an environment that is conducive to a healthy, sustainable and responsible growth of the tourism industry.

An integrated effort around these objectives will help us reach our high-level goals of *industry growth*, *sustainability* and *quality of life* for Nova Scotians. Each of these objectives is identified within the strategy for the next one to five years.

Reporting on Results
Measuring results is a key component of any strategy, because it tells us what is working and what isn't, and ensures accountability. The Tourism Partnership Council will continue to report on the progress of the Strategy with the assistance of our partners.

A strategy has limited usefulness if it doesn't address the general game plan for achieving our objectives and goals. That game plan has to outline the general approach and coordinate and assign responsibility for specific actions. The "Nova Scotia Integrated Tourism Plan" was created for this reason.

We realize that no plan is perfect and anticipate the need to adjust our strategy over the next few years. The TPC will consider proposed amendments to the plan according to a prescribed process developed by the Tourism Strategy Implementation Committee that formally records changes to the strategy, along with the rationale for the change. Research, evaluation and continuous consultation with industry partners will help ensure that we stay on track, anticipate change and make appropriate adjustments to the strategy.

Marketing Nova Scotia

In 2001, tourism in Nova Scotia is a billion-dollar industry. Although our revenues were not as high as last year, tourism has established itself as an economic driver for the province, and a sector that will continue to contribute to the growth and well being of Nova Scotia.

Year-end tourism industry indicators are not available at this time, but we are able to look at how things were shaping up, as of the end of October. It is important to remember that the *overall* industry indicators include all types of travel – regular business travel, visiting friends and relatives and other miscellaneous categories, not just the travelers targeted by our marketing programs.

Marketing Committee

The Marketing Committee provides the strategic direction to the Council for marketing the province. Responsibilities include marketing policy, a long-term marketing strategy and annual marketing plan.

The committee may organize standing committees and task forces to assist with its efforts. Standing committees and task forces are intended to deal with specific topics to assist with the Marketing Committee's efforts and will identify issues and options which may impede its ability to achieve its objectives and initiatives for Council consideration and action. The following committees / task forces were established by the Marketing Committee:

- 2002 Marketing Plan Task Force
- Tour Wholesaler Partnership Program Committee
- Destination Marketing Partnership Program Committee
- Travel Trade Task Force (completed 2001)
- Meetings, Conventions & Incentive Travel (MC&IT) Task Force
- E-Marketing Task Force (completed May 2001)
- E-Marketing Committee

Marketing Committee Members

- Co-chair, Pat Lyall, Delta Hotels
- Co-chair, Rick Young, Department of Tourism and Culture
- Bob Boyd, Department of Tourism and Culture
- Nicholas Carson, Prince George Hotel
- Charles Clerk, Island Beach Company
- Doug Fawthrop, White Point Beach Resort
- Irene Khattar, Irene Khattar & Associates
- Gary Powell, Atlantic Tours
- Brian Rodney, Best Western Mermaid
- Wendy Scott, Scott Walking Adventures
- Bob Sime, Regional Approach Ltd.
- John Somers, Department of Tourism and Culture
- Cathy Kalil, Tourism Partnership Council

Measuring the success of our marketing efforts

Every year we conduct conversion studies to measure the overall cost-effectiveness of our tourism advertising campaign. A random sample of people who responded to our advertising are contacted to gather information such as the rate of converting ad-generated inquirers into visitors, visitor profiles, trip expenditures and overall economic return as a result of our advertising activities. Information captured in the conversion study helps shape future advertising campaigns and helps determine how to maximize the return on our advertising dollars.

While the 2001 conversion study is not yet complete, it appears that our conversion rate and ad-generated revenues will be lower than in 2000.

2001: A Year in Review

Nova Scotia tourism remained a billion dollar industry in 2001. With the visitation currently below last year's level, it is estimated that we will complete 2001 with total revenues approximately 3% less than last year.

Our situation is a shared one. Many North American destinations are experiencing similar challenges for the very same reasons. The North American consumer is dealing with economic and political uncertainty, high fuel prices, increased competition with low air fares within the U.S. and the exchange rate, to name a few.

These market conditions were already having a dampening effect on our industry prior to the tragic events of September 11th. Although it's too early to predict the long-term outcome of this event, we are well positioned to react quickly and effectively as more market research becomes available.

2001 Marketing Success Stories

As far as individual marketing programs are concerned, we have some great successes in areas of the industry that we can most directly influence:

- Continued heavy use of direct marketing with a repeat performance of last year's significant increases in tourism literature requests.
- Seasonality initiatives: a new Winter Fulfillment Program, Spring Vacation Ideas Book, Fall Vacation Ideas Book, and a new Fall Extension Campaign.
- Continued strong direct to consumer campaigns in partnerships with Scotia Prince Cruises and Bay Ferries.
- Another successful East Coast Music Awards campaign with our partner, Oland Specialty Beer Company (a.k.a. Keith's) generated close to 15,000 inquiries.
- Leveraged Atlantic Canada Tourism Partnership dollars and private sector partnership dollars to promote the Nova Scotia brand in the Northeastern U.S. market.
- New activities directing a new niche market campaign (Golf and Outdoor/Nature) targeting markets in the U.S. using direct mail, e-mail and print ads.

- On December 2nd, CBC aired a Natalie MacMaster television special, and Nova Scotia partnered with Oland Specialty Beer Company in this sponsorship. Nova Scotia was the destination sponsor for this program with television ads offering a CD of Nova Scotia music, produced in co-operation with Keith's, with each Doers and Dreamers request.
- This year, exploreNS.com unveiled its newly enhanced web site at www.novascotia.com. These enhancements were made with the assistance of the E-Marketing Task Force, stakeholder input received through various consultation forums, as well as direct feedback from online consumers.

2002 Annual Marketing Plan Task Force

The role of the Annual Marketing Plan Task Force is to develop and evaluate, on an annual basis, the comprehensive annual tourism marketing plan – commonly referred to as the "provincial marketing plan" – for consideration and approval by the Marketing Committee and the Tourism Partnership Council.

In previous years, the Annual Marketing Plan was unveiled at the annual Tourism conference and included in Nova Scotia's Partnership Opportunities book. This year, the task force released the 2002 Marketing Plan as part of the new Integrated Tourism Plan for 2002. The Task Force is also responsible for overseeing the development of our annual Partnership Opportunities book, which offers a wide range of tourism programs to help grow the tourism industry in Nova Scotia.

2002 Marketing Plan Task Force Members

- Co-chair Irene Khattar, Irene Khattar & Associates
- Co-chair John Somers, Department of Tourism and Culture
- Kim Dickson, Town of New Glasgow
- Doug Fawthrop, White Point Beach Resort
- Robert Graham, Department of Tourism and Culture
- Jim Laceby, Blomidon Inn
- Pat Lynch, Department of Tourism and Culture
- Heather MacKenzie, Taste of Nova Scotia
- Sharon Martin, Department of Tourism and Culture
- Ella McQuinn, McQuinn & Co. Marketing
- John Somers, Department of Tourism and Culture
- Tanya Taylor-White, Parks Canada
- Ken Tutty, Gowrie House Country Inn
- Pam Wamback, Department of Tourism and Culture
- Cathy Kalil, Tourism Partnership Council

Overall Industry Indicators

Non-Resident Visitation

Non-resident visitation is one of our most important indicators of overall tourism industry performance in Nova Scotia. It does not indicate directly how much money is spent, nor does it address the amount of travel activity that was generated by Nova Scotians traveling in their own province. Overall year-

round visitation by non-residents reached 2 million people this year. Compared to 2000, from May to October 2001, total non-resident visitation was down 9%, with RV traffic down 14%, motorcoaches down 6%, and overall automobile traffic down 4%. As well, air visitation was down 20%.

Looking across our most important markets:
Overall Industry Visitation by Origin (January 1 to October 31):

- Atlantic Canada dropped 2%
- Quebec was down by 6%
- Ontario was down by 15%
- New England was down by 6%
- The bright spot being Europe, which was up 15%

Accommodation Activity

Another important indicator of overall industry performance is accommodation activity, including the number of room-nights sold and the occupancy rate. Unlike traffic data, these results do reflect the impact of Nova Scotians traveling in their own province, but do not include people who are staying with friends and relatives. From January to October 2001, accommodation activity remained even with last year's results in terms of total room-nights sold. This was accompanied by an average occupancy rate 4 percentage points below last year.

Marketing Program Results

Our marketing messages are designed to peak consumers' interest to contact us for more information, through the Internet, by telephone or through the mail. When they do, we capture their names and addresses in our customer database, so we can send them more information about visiting Nova Scotia.

Overall, Nova Scotia experienced a 2% increase in requests for information (or "*inquiries*") that can be traced directly to our advertising efforts. This particular statistic is important to us, because annual program evaluations (known as "*conversion studies*") show that a good proportion of the potential customers that request the *Doers and Dreamers* guide or other information are then motivated to visit Nova Scotia. Therefore, inquiries "convert" into visits, which means revenues for tourism operators.

In 2001, the number of inquiries attributable to our campaigns increased slightly over the record breaking levels achieved last year. Specifically, we experienced strong increases in inquiry levels in our American markets and decreases in our Canadian markets. The following is a breakdown of ad-generated results by origin (ad-generated web inquiries included):

- Atlantic Canada inquiries are down 23%
- Ontario inquiries are down 14%
- Quebec inquiries are down 28%
- New England/Mid-Atlantic inquiries are up 29%

Although ad-generated inquiries were down in many markets, what really counts is the revenues generated from our marketing campaigns. Based on our interim data, our direct response marketing programs generated approximately $130 million in industry revenues. This is a great return on $10 million in marketing campaigns!

Travel Trade Task Force

Last year, a Travel Trade Task Force was organized by the Tourism Partnership Council to review the current travel trade strategy; receive comments from Task Force members on the direction of the current travel trade strategy; and obtain suggestions by members to improve/enhance the strategy.

A major part of a travel trade strategy is building relationships with tour operators and travel agents within our target markets. We must ensure that our partners, such as tour operators and travel agents, are aware of what products are available and have the tools to sell them.

Travel Trade Task Force Members

- Doug Fawthrop, White Point Beach Resort
- Pat Lyall, Delta Hotels
- Gary Powell, Atlantic Ambassatours Gray Line
- Bob Sime, Regional Approach Ltd.
- John Somers, Department of Tourism and Culture
- Minto Stewart, Department of Tourism and Culture

2001 Achievements

- In January 2001, the task force completed its mandate of enhancing the travel trade strategy, which was approved by Council.
- This document presents trade components of the overall marketing plan for Nova Scotia.
- The Travel Trade Strategy has been integrated into the overall Tourism Strategy.
- Included in this strategy is an overview of the ***"TradeSmart Program"***.
    - This travel trade supplier certification program will provide industry with the tools necessary to make travel trade partnerships work better and to get tour operators and receptive operators to sell more Nova Scotia product.

TradeSmart Program

The Tourism Partnership Council and the Department of Tourism and Culture recently announced the introduction of TradeSmart – The Travel Trade Supplier Certification Program. Both the overall Tourism Strategy and Product Development Plan focus on ensuring we have a quality, competitive and sustainable tourism product. TradeSmart is a new kind of initiative resulting from our first Integrated Tourism Plan.

Nova Scotia has been working with the travel trade for many years. We recognize that by continuing to build successful travel trade partnerships, we can help to maximize the long-term growth and prosperity of the tourism industry. TradeSmart is a new and exciting program opportunity that will help to build our travel trade business.

Program Highlights

- A program that will help you learn more about the *how to's* of doing business with the travel trade, particularly tour operators, and also provides several types of support for your efforts to get business from the travel trade.

- The program is designed for accommodations, attractions and activity/adventure suppliers who are interested in getting more business from the motorcoach, specialty groups and/or FIT markets.

- There are two parts to this program-
  - The first is a two-day seminar that walks you through the structure of working with the travel trade and provides information on TradeSmart.
  - The second part is becoming TradeSmart certified.

- Participation in this program is entirely voluntary. Suppliers will continue to be eligible for participation in the provincial travel trade marketing initiatives whether or not they become TradeSmart certified.

- Profile will be provided to TradeSmart certified suppliers, where it is appropriate, in the province's travel trade marketing activities and materials, and tourism publications; they will be invited to participate in trade activities and receive referrals for travel trade business.

Meetings, Conventions & Incentive Travel (MC&IT) Task Force

The Meetings, Conventions & Incentive Travel Task Force was created to recommend a strategic direction and tactics to support the Council's initiatives in marketing meetings, conventions and incentive travel throughout Nova Scotia.

MC&IT Members included:

- Chair, Nicholas Carson, Prince George Hotel
- Marsha Andrews, Department of Tourism and Culture
- Loretta Buchanan, Slumber Inn
- Doug Fawthrop, White Point Beach Resort
- Shari Pierce, World Trade and Convention Centre
- Paul Stackhouse, Holiday Inn Harbourview
- Ken Tutty, Gowrie House Country Inn
- Cathy Kalil, Tourism Partnership Council

2001 Achievements

The Task Force completed its report, which was approved by Council. The recommendations were as follows:

- Meetings, Conventions & Incentive Travel be divided into two separate niches.
  - Meetings and Conventions
  - Incentive travel

- Assistance be provided by the provincial government to survey 200 to 300 meeting planners. This will assist in identifying their needs, processes and perimeters when selecting a destination for meetings and conventions.

- The Department of Tourism and Culture, in partnership with organizations involved in the meetings and conventions business, create a standardized tourism information package. This package would be distributed to confirmed delegates attending meetings/conventions in the province, as well as target potential delegates who are undecided.

- Purchase a meeting planner association database, which is a complete listing of every association that meets in Canada.

- Meetings and Conventions to be a part of the e-marketing plan.

- Develop a provincial meeting planners guide or expand the current meeting planners guide.

- Define criteria for properties involved in actual Meetings and Conventions business.

E-Marketing Task Force

The E-marketing Task Force was developed to review the Council's current Internet marketing strategy, to make practical recommendations regarding its Internet marketing efforts and to identify new initiatives to maximize the Council's return on its Internet resources.

E-marketing Task Force Members

- Chair Doreen Malone, Neptune Theatre
- Bob Boyd, Department of Tourism and Culture
- Charles Clerk, Island Beach Company
- Brian Hicks, TIANS
- Rob Laceby, Amherst Shore County Inn
- Wendy Scott, Scott Walking Adventures
- Stephen Simpson, The Orb Factory
- Vickie Siscoe, Department of Tourism and Culture
- John Somers, Department of Tourism and Culture
- Susan Tilley-Russell, CorporaTel
- Karl Webb, Havenside Bed & Breakfast
- Tom Wilson, Victoria County Recreation
- Cathy Kalil, Tourism Partnership Council

2001 Achievements

In 2001, the E-Marketing Task Force completed its final report with recommendations and was approved by Council. The following is a list of short-term and long-term recommendations that were included in the report:

- Strike a standing committee to manage ongoing E-Marketing opportunities. The committee would help direct the implementation of the recommendations outlined in this report, and report results to the Marketing Committee of the TPC.

- The web in our tourism strategy- requires a strategic approach and may require more resources. We need to commit to host a compelling site by adding more resources and orienting it around consumer and operator needs.

- Grow traffic – The ongoing acquisition of consumers through core advertising in online magazines and newspapers should continue.

- State the role for the web site – The site should continue its dual role of providing information and selling. The relationship of the various players involved (TPC, Technology partners, technology contractors, operators, allies, channel partners, etc.) should be defined, as part of a long-term strategy for the web.

- Do a technical audit of the site re its current orientation to search engines, etc.

- Undertake consumer research in the near term. It is the view of the Task Force that many of the fundamental improvements we have identified intuitively can be defined by this research.

- Improve navigation. A number of issues were identified related specifically to the way the site is laid out now. It is assumed that these will be addressed in concert with consumer research.

- Refine the web strategy and develop a project plan that will define implementation of these recommendations in the context of consumer research.

- Potential partnerships -- encourage more E-Marketing partnerships and business relationships.

- Define and communicate best practices/standards for industry on the web.

- Implementation Strategy – We recommend that a standing committee guide the implementation of this report, the research etc. on an ongoing basis. The committee should recruit members in areas where the Task Force sees deficiencies at present. Supported by consumer research a refined strategy and project plan will define in more detail the longer-term priorities around technology, navigation, etc.

E-Marketing Committee

As indicated, one of the recommendations made by the E-Marketing Task Force was to strike a standing committee to manage ongoing e-marketing opportunities, as well as help direct the implementation of the recommendations outlined in this report and report results to the Marketing Committee of the TPC.

E-Marketing Committee Members

- Chair Doreen Malone, Neptune Theatre
- Bob Boyd, Department of Tourism and Culture
- Charles Clerk, Island Beach Company
- Randolph De Gooyer, Maritime Marlin Travel
- Jim Laceby, Blomidon Inn
- Stephen Parsons, NorthSeas Software, Inc.
- Stephen Simpson, The Orb Factory
- Vickie Siscoe, Department of Tourism and Culture
- John Somers, Department of Tourism and Culture
- Jerry Staples, Halifax International Airport Authority
- Karl Webb, Havenside Bed & Breakfast
- Cathy Kalil, Tourism Partnership Council

2001 Achievements

- The E-Marketing Committee was recently created to fulfill this recommendation.
- Currently the committee is strengthening the on-line marketing plan.
- This committee will also develop appropriate policy surrounding e-marketing practices and ensure they are consistent and support the overall Tourism Strategy.

Strength in Partnership

Partnerships continue to play an integral role to grow the tourism industry in Nova Scotia - from transportation carriers to other government agencies to tour wholesalers, Regional Tourism Associations, industry operators, and non-traditional partners throughout the province.

Partnerships enable us to improve visitor experiences through product development initiatives; increase our marketing power and impact by leveraging partnership dollars; penetrate travel trade channels including tour operators and wholesalers; and meet market needs for vacation packaging, information and awareness about all that Nova Scotia has to offer. We believe in partnership first and foremost because it means informed decision making and more resources to do the job.

Partnership highlights

- Nova Scotia's longstanding partnership with Scotia Prince Cruises sells the Nova Scotia destination coupled with the 'how to get here' message of an important transportation partner in a key core market, the Northeast U.S. For 2001, this partnership continued to focus on a mix of programming which included television, newspaper, magazines and direct mail, most of which was partnered with the Canadian Tourism Commission. This enabled us to maximize our strategic marketing efforts while leveraging 30-cent dollars against our own budget.

- 2001 marked the fourth year of a partnership with Bay Ferries to take advantage of the new "fast-ferry" catamaran service. This partnership included direct mail, television and newspaper advertising in key U.S. and Canadian markets. The partnership also includes an on-site sales and visitor servicing presence for Nova Scotia in Bar Harbor, Maine.

- Outdoor and nature is one of our core strengths. We continue to reinforce this niche market with the Nature & Outdoor Lovers Guide. This guide was produced in partnership with the Nova Scotia Adventure Tourism Association and featured a section of day adventures. Over 100,000 copies of the guide were used as fulfillment to all outdoor-related inquiries received through Check-In (Nova Scotia's visitor information and reservations number) and Nova Scotia's official tourism web site novascotia.com. The guide was downloaded from the web site over 2,400 times, while the Day Adventure insert was downloaded over 1,700 times. The guide was available at Visitor Information Centres and through the in-province kiosk program.

- Our partnership with Golf Nova Scotia entered its third year and included the publication and distribution of 110,000 Golf Nova Scotia Guides. The guide featured member course profiles, including the number one ranked course in Canada, Highlands Links. The full colour publication was used as fulfillment to golf-related inquiries from Check In and Nova Scotia's official tourism web site, novascotia.com. The guide was a key part of the provincial spring and fall regional marketing campaigns and was distributed direct to consumers through consumer trade shows (Toronto, Montreal, Ottawa, Boston, Moncton, Halifax), Visitor Information Centres, member courses and through the in-province kiosk program. Golf inquiries have more than doubled this past year, as golfers learn more about the depth and scope of our existing product base. 2001 also marked the year for increased recognition of Nova Scotia as a significant golf/travel destination with a Silver Ranking in the ScoreGolf "Golfers' Choice Awards".

- Phase one of Nova Scotia's 2001/2002 Winter Advertising Campaign is underway. "Nova Scotia – Great Inns & Outings" is the first of two publications being produced in partnership with Saltscapes Magazine, Sobey's and 55 industry partners. The publication contains 60 winter offerings and numerous great ideas for a Nova Scotia winter holiday. A total of 100,000 copies were produced – 40,000 copies were inserted into the November issue of Saltscapes, 40,000 copies were mailed to Club Sobey's members and 20,000 copies were distributed to households in Maritime Canada.

- Nova Scotia's Partnership Opportunities 2002 was delivered to industry in October 2001 - earlier than previous years and designed in a more user friendly format for industry partners. The book provides industry with deadlines and costs for our traditional programs, as well as introduces several new ones. The early delivery date gave industry a chance to review the programs prior to the Tourism Conference in November, where the program "contacts" were available to answer questions.

- The Doers and Dreamers Complete Travel Guide is our most successful partnership with our own Nova Scotia industry and is the signature information piece. The guide, printed in both official languages, is distributed to 750,000 potential Anglophone visitors and 80,000 potential Francophone visitors as fulfillment to inquiries.

- We continued to pursue ongoing partnerships with the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership, Atlantic Canada Opportunities Agency and Enterprise Cape Breton Corporation, with numerous joint initiatives undertaken to build Nova Scotia's reputation as a world-class, four-season destination.

- For example, in Europe, we undertook partnerships with the Canadian Tourism Commission and the other Atlantic Provinces to market Atlantic Canada in the UK and Germany.

- Nova Scotia's participation in Salon Vacances, in partnership with VIA Rail, was a resounding success, according to Nova Scotia's private sector participants. From March 30th to April 1st, 39 representatives of Nova Scotia's tourism industry appeared at Salon Vacances, Quebec's largest annual consumer vacation show. The three-day event was held in Montreal and attracted over 50,000 consumers. Nova Scotia was a magnet for Montrealers seeking a vacation destination this year. 7,500 French and 450 English Doers & Dreamers Guides were distributed to consumers who requested them. Bookings were obtained at the show with indications that additional business would follow.

- Pharmasave signed on as a new partner in the production and distribution of the 2001 Festivals and Events Wall Map. The map is produced as a means of encouraging increased visitor length of stay and expenditure. The partnership included a financial contribution to the cost of producing the map, along with an expanded distribution of the map to include all 53 Pharmasave outlets in Nova Scotia. Over 4,000 maps were distributed throughout the province to VIC's, museums, gas retail outlets, restaurants, art galleries, craft shops, fixed-room accommodations, airport and bus terminals.

- In 2001, Nova Scotia partnered with New Brunswick, Tourism Atlantic and the Canadian Tourism Commission to promote the Bay of Fundy as a destination in Atlanta, Georgia and Tampa, Florida. The strategy included two separate routes to the consumer - direct mail,

magazine and newspaper advertising direct-to-consumer, as well as direct mail advertising to all AAA South members. The campaign time frame was March to May 2001. The recently completed conversion study identified a total of 4500 inquiries with a net conversion rate of 16 percent. These encouraging results will be applied to the year 2002.

- In the Southeast Atlantic and Mid-Western States, a number of joint marketing efforts with key partners were pursued. For example, we're working with New Brunswick to increase awareness of the Bay of Fundy as a phenomenal destination with pre-eminent touring and outdoor opportunities. This program is implemented with the cooperation of the Bay of Fundy Product Club, which is comprised of interested organizations and businesses surrounding the Bay of Fundy. The Club operates with funding support from the Canadian Tourism Commission, and is acting as the proponent with Atlantic Canada Opportunities Agency for the joint marketing initiative between Nova Scotia and New Brunswick.

- We also have operator partnership opportunities in place. They are open to a wide scope of operators and include travel guide advertising, co-operative advertising, direct mail and fulfillment opportunities and familiarization (fam) tours. **In terms of fam tours alone, every dollar the province invests is matched four times over by industry.** The partnership program for industry operators differs according to market.
  - In Atlantic Canada, partnership opportunities included the Spring, Summer, Fall and Winter Vacation Ideas Books; the Festivals and Events Digest and a pre Christmas campaign.
  - In Ontario, partnership opportunities included advertising offers in Reader's Digest (Eastern Canada Edition) and the Toronto Star newspaper; and an opportunity to attend the Ontario Motorcoach Association Annual Convention.
  - In Northeastern U.S., partnership opportunities included Yankee Magazine and Boston Globe newspaper impact sections; and the Fair and Friendly Exchange Program.
  - In Quebec, partnership opportunities included participation in the "Ici, on parle francais," program; French travel guide "du réve à l'Adventure Guide touristique."; and major travel shows, such a Salon Vacances et Loisirs d'été.
  - In Europe, partnership opportunities included the Mid-Atlantic Seminars in Reykjavik, Iceland.

Tour Operator Partnership Program

- Accords are in place with tour operators and wholesalers that offer Nova Scotia products for sale. In 2001, 12 tour operators received support under our **Tour Operator Partnership Program**. Funding was used to support attendance at trade shows, advertising in strategic publications and familiarization tours and marketing support. The following criteria was used to qualify participants in the program:

  - For Trade Show Activities - Shows must fall in our core markets; those that the Tourism Division attend are not eligible for support, and shows in regional market (Atlantic Canada) are not eligible for support.

  - Advertising - Ads in provincially-supported publications (Doers & Dreamers Travel Guide, Atlantic Canada Tour Planner and Meeting & Convention Planner) are not

eligible for support, details of the advertising program must be presented before support is offered and tear sheets must be provided with invoices.

- Fam Tour Program - The following formula is used to determine the amount of support given for familiarization tours: $50.00 per person, per day. Details of fam tours need to be presented before support is provided.

- Report and Evaluation - A quarterly activity report must be submitted by all operators who receive funding.

- Timely Submission of Invoices - All invoices must be submitted to the Tourism Division of the Department of Tourism and Culture by March 31, 2002.

- **A Tour Operator Partnership Program Task Force** evaluated proposals from tour operators.
Members included:
  - Pat Lyall, Delta Hotels
  - Michele Bourgeois, Department of Tourism and Culture
  - Maureen Carroll, Maureen Carroll and Associates
  - Cindy Wade, Department of Tourism and Culture
  - Pam Wamback, Perimis Hospitality

Destination Marketing Program

- We worked with many partners under the Destination Marketing Program. This $400,000 program, in partnership with local tourism associations, provides many smaller operators with an opportunity to join together to attract visitors to their regions. A portion of the Destination Marketing Program is also used to support regional festivals and events, as well as multi-regional and province-wide initiatives.

- General eligibility criteria for the Destination Marketing Program:
  - a detailed marketing plan must accompany each project proposal;
  - funding support is only available for destination marketing initiatives;
  - project activities must complement provincial tourism marketing strategy;
  - projects must include quantifiable objectives and a plan for evaluation;
  - where appropriate, creative must be submitted for approval prior to final production;
  - all projects supported under the DMP must include the Nova Scotia visual identity and credit Tourism & Culture support;
  - projects may include, but cannot exceed, maximum 50% financial support from the Provincial Government

- **A Destination Marketing Committee** manages the Destination Marketing Program.
Members include:
  - Bill Hay, Chair, Mastodon Ridge & Showcase Nova Scotia
  - Lynne Perry, South Shore Tourism Association
  - Patricia Lynch, Department of Tourism and Culture
  - Pam Wamback, Department of Tourism and Culture

- To date, projects supported by the Program includes: Hotel Association of Nova Scotia direct mail campaign, Studio Rally 2001, Northumberland Strait Marketing Group, TIANS / Metro Radio Group, Nova Scotia Museum (radio campaign for Sherbrooke Village, Ross Farm, Highland Village), Nova Scotia's Winter Guide, Halifax Entertainment Season, Field, Farms & Vineyards (marketing campaign for agri/aqua tourism) and Taste of Nova Scotia winter marketing campaign.

Product Development Committee

The Product Development Committee is working to ensure the competitiveness and market readiness of Nova Scotia's key products, destinations, attractions and tourism industry members. The committee also facilitates a supportive environment which encourages the development of tourism in Nova Scotia. Over the past year the Committee has worked to transform the Product Development Discussion Paper into a long-term Product Development Plan which will guide and focus our efforts over the next three to five years.

Members include:

- Chair, Doug Fawthrop, White Point Beach Resort
- Peggy Anderson, Kidston Landing Country Store Ltd.
- Bruce Anderson, Bell Bay Golf Club
- Bill Hay, Mastodon Ridge
- Lou Leith, Budget Car and Truck Rental
- Pat Nelder, Cape Breton Lake Charters
- Glen MacDonald, Dundee Resort and Golf Club
- Don Mingo, The Mingo Group
- Cathy McKenzie, Enterprise Cape Breton Corporation
- Rob McDonald, Atlantic Canada Opportunities Agency
- Mart Johanson, Parks Canada
- John Hennigar-Shuh, Nova Scotia Museums, Department of Tourism and Culture
- Bob Book, Department of Tourism and Culture
- Lori Blackburn, Department of Tourism and Culture
- Peggy Tibbo-Cameron, Tourism Partnership Council

2001 Achievements

- The Product Development Committee developed **a long-term Product Development Plan** based on the product development discussion paper released at the November 2000 Tourism Conference. The Product Development Plan was a province-wide initiative, which recognized the many stakeholders involved in product development, such as tourism industry members, regional tourism industry associations, regional development authorities, provincial and federal governments, municipalities and community groups. Although the plan is very broad, not all of the initiatives discussed will be implemented in the short term. With input from various stakeholders and discussion forums throughout Nova Scotia, the Tourism Partnership Council's Product Development Committee has identified strategic objectives for the next three to five years for implementation. Recognizing there is not one group or organization responsible for all product development efforts, this plan is designed to collectively work towards common goals.

  It is important to note that this plan is based on the Tourism Product-Market Match Study, the specific objective of which was to access Nova Scotia's tourism products by consolidating existing market and product research, providing a basis for scoring and ranking tourism products on both product and market criteria. In addition to this assessment and research consolidation, the process identified information and research gaps, emerging products for

future development consideration in Nova Scotia, and key infrastructure needs, as well as the most pressing product development needs within each product category. The Product-Market Match Model created as part of this study provides a tool which will assist in preparing product development strategies and setting priorities. The Model is designed to be updated as new market data and insights become available and also to be fine-tuned to reflect different priorities.

The Product Development Plan serves as a base for the Tourism Partnership Council to formulate an annual strategic action plan clearly identifying priorities for product development. In addition, it will lead to the adoption of long-term objectives and strategies to help maximize tourism benefits and competitively position Nova Scotia in the world marketplace.

- **Regional Consultation Sessions with the Product Development Plan (January - April 2001)**. Regional consultations were held around the province to elicit further comments and suggestions from the industry on the key long term issues of product development, as well as discussing the product priorities for 2002/2003. This input was included in the final plans. Industry will continue to play an important role in providing ongoing input to further annual plans.

- **2002 Annual Product Development Plan:** As part of the process of finalizing the long-term Product Development Plan, the Committee then undertook to identify specific actions for 2002 and to develop an annual plan with specific product priorities. To ensure that both the long-term strategic issues, as well as the annual priorities are addressed, the Council has developed a Task Force to direct the product priorities for each year.

  For the first year of development, three priority experience areas have been identified; the authentic seacoast experience, the culture & heritage experience and the outdoor/nature experience. While "Quality" and "Build a 12-Month Season" are two of the overall strategic objectives in the Tourism Strategy, it was decided that seasonal and quality issues need to be integrated throughout all the priorities rather than highlighting them as specific priority areas. To grow the tourism industry, the shoulder and winter seasons need to be developed and enhanced. Under these two seasons, a number of development opportunities exist and have the potential of increasing overall visitation, length of stay and tourism revenues. Likewise, quality will be a part of every initiative we undertake.

  In addition to the three priority experience areas being used to establish year one actions for the development plan, there are a number of product enhancers or other priority actions that don't necessarily fit within the three stated priority experiences. These training, influencing and advocacy actions clearly run through the entire plan and are critical to achieving the objectives of the Product Development Plan and the overall objectives of the Tourism Strategy. For the initial year of 2002, an action plan has been created for each priority by identifying specific initiatives for implementation, potential partners, timing, status and measurement. The priorities outlined will not remain constant. An annual review and evaluation of the action plan will be completed to determine the priorities for subsequent years and encourage stakeholders to identify opportunities, take a lead role and implement specific actions. This will ensure the tourism industry as a whole will have the opportunity to work together toward its common goals.

Future plans:

The priority of the Product Development Committee will be to provide the strategic direction to the Council for product development for the province. Responsibilities include product development policy, a long-term product development strategy and an annual product development plan.

As a first step, the Committee will establish a 2002 Product Development Task Force to implement the Annual Plan for 2002 and develop action plans for each initiative. Additionally, the Task Force's role will be to develop and evaluate on an ongoing basis, the comprehensive annual tourism product development plan for consideration and approval of the Product Development Committee and the Tourism Partnership Council.

The Product Development Committee will now focus on more strategic product issues, as well as focus on areas of the long-term plan that will be priorities for the coming year.

In addition, the Committee will have an active role in evaluating the effectiveness and impact of initiatives funded under the tourism development programs that will be based on the actions included in the annual product development plan.

Vision Committee

We also have a Vision Committee whose mandate is to lead and be the catalyst for the creation of a long-term comprehensive vision for Nova Scotia's Tourism industry. This vision will demonstrate the full, positive potential economic impact of the industry and demonstrate the far-ranging positive spin offs Tourism growth can have on the quality of life in this province.

Members of the Tourism Strategy Steering Committee included:

- Chair, Bill Hay, Mastodon Ridge & Showcase Nova Scotia
- Bruce Anderson, Bell Bay Golf Club
- Stephen Coyle, Department of Tourism and Culture
- Doug Fawthrop, White Point Beach Resort
- Robert Graham, Department of Tourism and Culture
- Scott MacAulay, Inverary Resort
- Robert MacDonald, Atlantic Canada Opportunities Agency
- Doug Matthews, Department of Tourism and Culture
- Kim McCallum, Scotia Pine Campground Ltd.
- David Miller, McDonald's Restaurant
- Paul Stackhouse, Holiday Inn Harbourview
- Gordon Stewart, Terelle Management Inc.
- Karl Webb, Havenside Bed and Breakfast
- Cathy Kalil, Tourism Partnership Council

2001 Achievements

The Vision Committee is in the process of creating a vision of Nova Scotia's Tourism industry in the year 2020. This vision report will incorporate both long-term strategic planning for the council, and marketing and product development planning for the tourism industry.

The Committee completed an outline for such a vision indicating program components and a structure for this creative process, as well as constructive exercises that will assist in developing a long-term comprehensive vision for Nova Scotia's tourism industry. The Vision Committee has achieved the following:

- Completed research (quantitative and qualitative) regarding where we were 25 years ago, where we are now, as well as looked at trends and forecasts for the future, in order to create a long-term comprehensive vision for Nova Scotia's tourism industry.

- Identified core impact areas (and elements within each area) and weighted them in accordance to their importance on Tourism growth.

Part of the committee's mandate is to develop a two-year process to create a vision of Nova Scotia's Tourism industry in the year 2020. The Vision Committee believes they can fast track this process and complete the long-term vision report for the Tourism industry by March 31, 2002. This document will then be distributed to participants from the Tourism industry for review and input.

Tourism Strategy Implementation Committee

The Tourism Strategy Implementation Committee was created after the completion of the Tourism Strategy. Its mandate is to coordinate and monitor the ongoing implementation of the Tourism Strategy.

Tourism Strategy Implementation Committee Members

- Chair, Paul Stackhouse, Holiday Inn Harbourview
- Marsha Andrews, Department of Tourism and Culture
- Bob Book, Department of Tourism and Culture
- Judith Cabrita, TIANS
- Jo Ann Fewer, Colchester Regional Development Agency
- Bill Hay, Mastodon Ridge & Showcase NS
- Robert McDonald, ACOA
- John Somers, Department of Tourism and Culture
- Gordon Stewart, Terelle Management Inc.
- Cathy Kalil, Tourism Partnership Council

2001 Achievements

- The Committee developed a method to review proposed amendments to the Tourism Strategy and process amendments on an ongoing basis for consideration by the Council.

- The Committee has coordinated with all the relevant Council committees and task forces and developed a master implementation plan/grid that integrates objectives, programming, responsibilities and time lines. This implementation grid will be maintained by the Tourism Strategy Implementation Committee to keep track of ongoing initiatives.

- The Committee participated in the development of the Nova Scotia Integrated Tourism Plan for 2002.

Executive Committee

An Executive Committee helps to manage the work load and keeps the Council on track. The group organizes reporting information, brings recommendations forward and oversees internal and external communications. Because of the Council's relationship with government, we have also been called on to make recommendations on broader issues that affect the industry.

The Executive Committee is made up of members appointed by the Council, with the Chair of the Council at the helm. The Executive Director of the Tourism Division of the Department of Tourism and Culture, as well as the second government member, are also standing members.

The Executive is also responsible for the communications for the Council and as such keeps the industry informed about activities underway by the Tourism Partnership Council.

Members of the Executive Committee include:

- Chair, Paul Stackhouse, Holiday Inn Harbourview
- Marsha Andrews, Department of Tourism and Culture
- Doug Fawthrop, White Point Beach Resort
- Bill Hay, Mastodon Ridge & Showcase Nova Scotia
- Doug Matthews, Department of Tourism and Culture
- Peggy Tibbo-Cameron, Tourism Partnership Council

2001 Achievements

- Revised the Operating Guidelines for the Council to better reflect the Council's method of operation.

- Continued to improve relationships with industry associations, as well as, the Atlantic Canada Tourism Partnership and the Canadian Tourism Commission through participation in meetings, seeking input and initiating ongoing communication activities. Further developed a support program to ensure Nova Scotia participation on key CTC committees.

- Future activities will focus on seeking more input and hosting more industry consultations; overseeing the implementation of the Tourism Strategy and the Integrated Tourism Plan; promoting inclusion and increasing membership in all committees; encouraging and building stronger partnerships and development of policies in areas such as:
  - improved competitiveness of the industry
  - infrastructure development including financing options
  - quality/standards
  - visitor information services
  - resource management

- Continued implementation of the Communications Plan designed to keep stakeholders informed about provincial programs and services, as well as increase awareness and understanding of the importance of tourism to the economy of Nova Scotia and the opportunities and challenges that exist for the industry.

- Updated and revised the Council web site (www.nstpc.com) to help operators gain more insight and information on Council programs.

- Conducted media relations, including issuing news releases and responding to inquiries.

- Presentation to government caucus seeking further financial and supportive investment in the tourism sector.

Selection Committee

The Selection Committee includes the Past-Chair of the Council who will chair the Selection Committee, one (1) government representative on the Council, the President of Tourism Industry Association of Nova Scotia (TIANS) and two (2) additional industry representatives, selected by the Chair of the Council Selection Committee.

Members included:

- Chair, Doug Fawthrop, White Point Beach Resort, Liverpool
- Paul Stackhouse, Holiday Inn Harbourview, Dartmouth
- Scott MacAulay, Cape Breton Island Resorts, Baddeck
- Marsha Andrews, Department of Tourism and Culture
- Karl Webb, Havenside Bed and Breakfast and President of TIANS

The Committee meets as required to fill any vacancies that occur and makes their recommendations to the Minister for approval and appointment.

Integrated Resource Management (IRM) Task Force

The Integrated Resource Management Task Force was created by the Tourism Partnership Council to review the Integrated Resource Management Plan for Crown lands released by the Nova Scotia Department of Natural Resources. A discussion paper was written which addresses tourism-related issues arising out of the IRM process.

The Task Force identified a number of issues that are of immediate concern, in addition to a number of others that have a longer-term focus. As a first step, the short-term issues were described and presented for immediate action.

Members of the IRM Task Force included:

- Chair, Ella McQuinn, McQuinn & Co. Marketing
- Jennifer Archibald, Tourism Industry Association of Nova Scotia (TIANS)
- Greg Beaulieu, Department of Tourism and Culture
- Bob Book, Department of Tourism and Culture
- Kim McCallum, Scotia Pine Campground Ltd.
- Gordon Phillips, Economic Planning Group
- Wendy Scott, Scott Walking Tours
- David Ross, Department of Tourism and Culture
- Peggy Tibbo-Cameron, Tourism Partnership Council

The coastline and our natural environment are of major importance to the tourism industry in Nova Scotia as we position the province as a seacoast destination. This unspoiled image is critical to our markets in New England and Europe. The IRM process which addresses a portion of the land in the province we are concerned about, has not resulted in meaningful input from the tourism industry. There is an urgent need that the process in the future includes tourism input and concerns. With only a limited amount of crown land and competing interests from mining and forestry, it is important to set aside land for sustainable tourism growth. The Council wants to actively participate in the IRM process to facilitate tourism interests and wants to work with the Department of Natural Resources to move the process forward for the benefit of tourism.

2001 Achievements

- Completed a Discussion Paper for the Tourism Partnership Council which addresses tourism-related issues arising out of the IRM process.

- The Tourism Partnership Council and department staff met with Natural Resources to address key tourism issues related to integrated resource management. Together we will be developing tourism related values for all Crown land in Nova Scotia. And Natural Resources has agreed to include this information into their integrated resource management process. This will help ensure that tourism interests are considered when management plans are developed for Crown land. Additionally, we will develop a process to ensure that tourism input will be part of an ongoing process beginning later this month.

Visitor Information Services (VIS) Task Force

The Tourism Partnership Council established a Visitor Information Services Task Force in October 2000 to develop a discussion paper for the Council to provide the Council with the facts needed to make decisions on how best to provide quality customer services to Nova Scotia visitors in the future. The paper explored the issues surrounding visitor information services from a customer and quality services perspective including the provincial delivery system and many of the services offered regionally. Specifically, the study was to focus on: Check In services, the literature distribution centre, information kiosks, visitor information centres (local and provincial), print materials, technology, training, rest areas, language of visitor services, and research and evaluation of customer satisfaction in all industry operations. Other topics added during the process included: 1- 800 numbers, Fair and Friendly program, Open Door program, Ici on parle français program, Compliments and Complaints Program and signage.

Members of the VIS Task Force included:

- Chair, Donald Gunn, Stonehame Chalets
- Bob Boyd, Department Tourism and Culture
- Kim Dickson, Pictou County Tourist Association
- Pat Fleury, Retired, Kingston/Greenwood VIC
- Darlene Grant Fiander, TIANS Human Resource Council
- Pat Lynch, Department of Tourism and Culture
- Lisa MacIsaac, Department of Tourism and Culture
- Sharon Martin, Department of Tourism and Culture

- Lynne Perry, South Shore Tourism Association
- Tanya Taylor-White, Parks Canada
- Ken Tutty, Gowrie House Country Inn
- Peggy Tibbo-Cameron, Tourism Partnership Council

Quality visitor services are critical to the Nova Scotia visitors and therefore to all tourism operators in the province. In addition to aggressively marketing the province, we must deliver quality visitor services to ensure our customers' satisfaction, as well as their repeat visitation and trip extension. Visitor services is in-province marketing, the final transaction of the marketing and promotion program.

Visitor information centres are fundamental for the provision of visitor information services in the province. Visitor information services province wide provide high-quality, in-person travel counselling and reservation services to visitors, through the operation of a network of 11 provincial and 66 locally operated VICs throughout the province. More than 856,000 visitors received travel counselling services at provincial VICs in 2001 and approximately 667,000 were counselled at local information centres. It is estimated that visitors who are counselled by trained professionals at VICs spend on average 11% more in the destination than those who are not counselled. Additionally, 36% of those counselled, travelled to a part of the province they would not have otherwise visited.

While discussions focussed primarily on issues surrounding visitor services in Nova Scotia, the facts revealed many positive aspects of current levels of visitor servicing in the province. It is equally important to recognize and maintain what we are doing well as it is to identify what we can improve upon.

There is a general perception that there are too many VICs operating in the province. Issues include overall service quality, building deficiencies, hours and duration of operation, staff training, number of visitors, operational costs and cost per visitor counselled.

Challenges of resources, both human and financial, will continue to exist. An overall strategy will ensure that we maximize those resources by reducing duplication, more effectively utilizing available technologies, and offering only the highest level of service by well-trained staff will consequently yield the best service possible to the Nova Scotia visitors.

Current Issues :
While the Task Force discussed numerous issues under each topic area, the majority fell under the following categories:

- Quality - Quality is a number one priority of the overall Nova Scotia Tourism Strategy and is key to every aspect of visitor information servicing. Equally important to attracting and keeping visitors is the need to meet and exceed their expectations.

- Seasonality - Seasonality is also a priority of the Tourism Strategy. If we are promoting a twelve-month season to the industry and to our visitors, we need to ensure that visitor information services are also available on a twelve-month basis.

- Training is often viewed by operators as a cost to the operation rather than an investment in quality and a key to increased expenditures particularly at the entry-level positions.

- Resources - Human - As the tourism industry in N.S. continues to generate increases in revenues, so too will the labour market for tourism occupations see steady growth. Current labour market information indicates that tourism-related occupations are expected to rise substantially over the next five years.

  Resources - Financial - Our financial resources will continue to challenge all aspects of visitor information services.

- Evaluation of effectiveness - Improvement of visitor services in the province requires a constant evaluation of our effectiveness in every program and in everything we do.

- Industry Awareness - promoting the value of the tourism industry within industry and to residents is a key consideration for moving visitor information services forward.

Key Recommendations to the Tourism Partnership Council :

- It is strongly recommended that a TPC Visitor Information Services Implementation Committee (representing all partners) be appointed to ensure implementation of all the following recommendations.

- Develop and implement a 5 year Visitor Information Services Strategy and annual action plans to manage and connect the provincial network of visitor information centres. This would apply to all centres (local and provincial), information kiosks, rest areas and natural stopping areas and include:
  - defining/confirming the mandates and roles of VICs,
  - ensuring all locations are strategic and non duplicating,
  - establishing specific content requirements, training, human resources, return on investment and partnership role and
  - best practices.

- Develop a Tourism Awareness Campaign: The tourism industry and Nova Scotians are key partners in delivering quality service to visitors. However, there is a need to ensure that all players understand the value and opportunities which are involved in quality service to fully realize our potential.

- Develop a Check In Advisory Committee

Policy Committee

The role of the TPC Policy Committee is to develop discussion papers on selected tourism policy issues, collecting input from the various stakeholders, identifying the issues, concerns, impacts and opportunities for the benefit of all stakeholders.

The mandate of the TPC Policy Committee is to identify, investigate and generate discussion on selected tourism policy issues. The committee would prepare discussion papers on each of these issues that would include the important interests and factors involved, the impacts, opportunities and options for resolution. It is not the mandate of the committee to recommend a specific solution for any or all of these policy issues.

Members of the Policy Committee include:

- Chair Doug Fawthrop, White Point Beach Resort
- Rhonda Kelly, Colchester Regional Economic Development Agency
- Kim McCallum, Scotia Pine Campground Ltd.
- David Ross, Department of Tourism and Culture
- Ken Tutty, Gowrie House Country Inn
- Karl Webb, Havenside Bed and Breakfast / TIANS
- Rick Young, Department of Tourism and Culture
- Peggy Tibbo-Cameron, Tourism Partnership Council

Initial research by the Policy Committee has identified a preliminary list of policy issues for prioritization and consideration. As the first stage in the attempt to focus the Committee's efforts, each issue is being ranked on their importance and/or impact with respect to the achievement of the six strategic objectives identified under Nova Scotia's Tourism Strategy. Those issues identified as having the highest priority will form the foundation of the Policy Committee's work plan.

Committee discussions and preliminary research have resulted in a number of potential policy issues categorized as follows:

- Transportation related: Air Access/Airline Restructuring, Provincial and Atlantic Canada Airport's System, Customs and Immigration, Ferry Access, Motorcoach Regulations, Signage, Provincial Scenic Travelways System;

- Land-Use: Coastal Access, Provincial Parks/Protected and Wilderness Areas/Nature Reserves, Federal Parks/Historic Sites/Marine Parks;

- Taxation: Accommodation Assessment/Taxation, Accommodation Room Surcharge, Business Occupancy Tax Review;

- Environmental: Beverage Container Rebate/Surcharge;

- Other: Deregulated Shopping Hours; Smoke-free Workplace Legislation, Federal/Provincial Funding Agreements; Private Access to Capital/Financing.

Transportation Access

Improving transportation access linking Nova Scotia to its markets and infrastructure within our province remains a challenge to the growth of our tourism industry. In 2001, some transportation partners weathered the soft season relatively well.

On the other hand, there were reductions in air access into Nova Scotia. Following the tragic events of September 11th, further pressures on air access continue to occur. The current situation is very dynamic and hard to predict. The TPC will address these issues by:

- Consolidating the efforts of multiple air access committees to ensure our industry is a strong and effective proponent in bringing more air capacity to Nova Scotia.

- Encouraging expansion and promotion of the Halifax International Airport as an international gateway to Canada. This will involve:

    1. influencing the federal government to change the transportation policy to enable international air carriers easier access to fly into Halifax; and
    2. working with the Halifax International Airport Authority in joint marketing initiatives aimed at new carriers.

Other transportation modes and related issues such as customs and immigration, ferry access, motorcoach regulations, signage and the provincial scenic travelways system will also be addressed.

In 2002, we will seek new marketing opportunities with airline partners and continue with strategic partnerships with ferry operators linking Nova Scotia to the State of Maine.

Challenges for the Future

The Tourism Partnership Council is celebrating its third full year of operation. Created in May 1998, the Council has enjoyed remarkable success and enormous commitment from both the private and public sector. By all accounts, it's working !

While the Council has been successful, there is always room for improvement and we must continue to strengthen and promote the partnership.

Some of the challenges we need to address in the coming year include:

- A requirement for an increased "Financial Investment" by the Government. It has been demonstrated that there is a direct relationship between the amount of money spent on the development and marketing of Nova Scotia's tourism products and the financial returns to the province as a result of the investment. Budgetary considerations in the past two years has shown some recognition of the importance of the marketing relationship to an economic return, while the Product Development component has not faired as well. We need increased investments for marketing initiatives to more heavily invest in core markets like Boston, Toronto and Montreal, where we are nowhere near our potential. We need increased investments to replace the loss of the Economic Diversification Agreement project funding. This will continue programs such as our coastal hiking trail program and build our competitiveness through sustainable and market ready products. And, we need an increased investment to off-set the decrease in buying power we have experienced over the last few years.

- A requirement for a "Supportive Investment" by the Government. We need support in areas which impact on our ability to do business. Increased efforts to improve the business climate are just as important as financial contributions and cover a wide range of topics, including: legislation, actions of other departments, timely resolution of issues, and public recognition of the importance of the Tourism sector as an economic contributor.

- Increasing need for industry involvement in the implementation of the Integrated Tourism Plan for 2002.

- Building on communication priorities, finding more effective ways of communicating with industry and for them to communicate with the Council.

- Close monitoring of the effects of terrorists activities in the United States on people's desire to travel and making the necessary adjustments to our tourism plan.

2002 Priorities

MARKETING PRIORITIES FOR 2002

Given the events of this September, looking ahead, at least in the short term, is proving to be more difficult than in previous years. However, we can realistically expect the following to hold for 2002:

- Continued economic uncertainty in every market, with at least a mild recession now seeming more likely.
- Consumer attitudes are likely to be affected by the events of September 11th, but for how long?
- Air transport capacity shifts are occurring with reductions in air travel likely.
- Accurate forecasting will be challenging in this current environment and much will depend on the next few months.

The Nova Scotia Tourism Partnership Council is taking a measured approach in making tactical adjustments to the marketing programs outlined in our Integrated Tourism Plan for 2002. We will weigh every opportunity and need with reasoned and strategic thinking, not with a timid approach. But we will not abandon any core market in 2002. Our objectives of building visitation and revenue next year remain front and centre.

Some of the marketing highlights contained in the Integrated Tourism Plan for 2002 include:

- A new creative approach in advertising.
- Continuing efforts in Quebec, while closely monitoring and assessing results.
- Continuing to build on e-marketing success with new programs and promotions.
- Remaining flexible with marketing plans for U.S. and Canada.
- Increasing focus on meetings and conventions during non-peak times.

The Council is actively tracking tourism industry trends and research in order to identify critical decision dates for planned activities and promotions. We will continue to remain alert, reasoned and strategic in how we approach all of our markets. The following is a brief overview of our marketing priorities for 2002.

More Internet

The Internet continues to be our fastest growing communications medium with customers. We will continue to improve our on-line presence by making more seasonal content available on our web site, driving traffic to the site through cross marketing with other media and improving the ease of navigation. Elements of our Internet programming appear throughout our various marketing programs. The Nova Scotia Partnership Opportunities for 2002 offers a new web site advertising opportunity for operators who participate in the Travel Guide listings.

The E-Marketing Committee will continue to guide the implementation of the recommendations of the E-Marketing Task Force, which were outlined earlier in this Report Card. In addition, the committee will further develop the Council's approach to e-marketing Nova Scotia as a tourism destination by examining ongoing e-marketing opportunities.

Building a 12-Month Season

A major challenge for our tourism industry is the seasonal nature of our business. Building a 12-month

season is one of the strategic objectives outlined in our Tourism Strategy. We will continue to address this issue by developing and marketing products that have year-round appeal to Atlantic Canadian consumers and by targeting the medium and small meetings market.

Early in the new year, we will tie into our 2001 pre-Christmas promotion (which was a new initiative for 2001) with an insert and overprint of our Saltscapes piece. As well, we will continue to work on building synergy with other destination marketing organization partners, such as Regional Tourism Industry Associations.

We believe that we can increase our non-peak business by making our direct to consumer efforts in Atlantic Canada more cost-effective, while increasing our focus on an area that holds great potential – the meetings and conventions market. As outlined in the Nova Scotia Integrated Tourism Plan for 2002, we will work with the Greater Halifax Conventions and Meetings Bureau to increase Nova Scotia's share of this multi-billion dollar industry. In addition, we will work with partners to address the regional, smaller meetings market.

For the spring and fall, or "shoulder" seasons, our products and markets are not all that different from our summer offering. However, we will continue to represent the Nova Scotia vacation experience in a way that makes the target audience (more skewed to couples not traveling with children) think about us as a potential destination in those times of the year. In 2002, we will target Atlantic Canada, Ontario, Quebec and the Northeastern United States with various combinations of print and TV advertising, direct mail, seasonal literature and Internet support.

More Travel Trade

Nova Scotia has worked closely with the travel trade for many years. The travel trade channel is a complex and ever-evolving business environment which seems to defy simple definition and cookie-cutter approaches to marketing partnerships. That's why we created flexible programming to work hand-in-hand with trade partners who can maximize the benefit for Nova Scotia on a sustainable basis. Working with the trade allows us to access customers who are looking for travel packages, speciality "niche" experiences, or those who are more comfortable using a travel agent to plan their vacation, because they are unfamiliar with us.

In addition to our work with tour operators, wholesalers and travel agents, we also introduced *TradeSmart* to the industry in our 2002 Partnership Opportunities booklet. This training and certification program will assist our operators to better understand the needs of this marketing channel.

Measurable Objectives

Given the trends of 2001 and events of September 11th, forecasting is proving to be more difficult than in previous years. Accuracy is a challenge and much will depend on the next few months, as economic and political uncertainty continue to influence markets.

The impact of our programs will be gauged using a number of measurements, such as:

- Overall growth of revenue.
- Return on investment (ROI) for specific programs/initiatives.
- Increased awareness of Nova Scotia.
- Partnership participation.
- Number of room-nights sold.
- Visitor participation and satisfaction levels.

Touring and General Destination Markets

Our biggest target markets continue to be what we loosely call the "general touring" markets, which we identify by geographical regions. These include visitors who tour around the province and those who come to a destination area and want to experience the wide variety of things to do and see what Nova Scotia offers.

Core and Developing Markets

We refer to these markets as either being core markets or developing markets. Core markets are where we are well established with sizable numbers of visitors, (in most cases) some measurable level of consumer awareness and the expectation that money spent on marketing will have a positive return on investment within the same year. Our core markets include Atlantic Canada, Ontario, Quebec and the Northeastern United States. Our expectations are longer-term in our developing markets, which include Europe, Western Canada and the South Atlantic States.

Travel Trade vs. Direct to Consumer

In broad terms, we take two parallel routes to sell to our customers: we communicate directly with consumers, and concurrently work through the travel trade. The travel trade is a distribution and marketing channel that includes the tour operators, tour wholesalers, travel agents and transportation carriers who are often the intermediaries between us and our customers.

In a given market, where consumer awareness of Nova Scotia is low and there are significant logical, transportation and/or cultural barriers, we place more emphasis on the travel trade as a marketing channel. For example, in Nova Scotia we place very little emphasis on marketing to travel agents. In Ontario and the Northeastern United States, where just one-fifth of our customers use the travel trade, we employ some travel trade marketing. In Europe, where a large proportion of our customers buy packages or buy through travel agents, most of our marketing efforts concentrate on the travel trade distribution channel.

We believe that we can work collectively and cooperatively to grow the industry, ensure sustainability and improve the quality of life for all Nova Scotians.

2002 PRODUCT PRIORITIES

For the first year of development, three priority experience areas have been identified; the authentic seacoast experience, the culture & heritage experience and the outdoor/nature experience. While "Quality" and "Build a 12-Month Season" are two of the overall strategic objectives in the Tourism Strategy, it was decided that seasonal and quality issues need to be integrated throughout all the priorities, rather than highlighting them as specific priority areas. To grow the tourism industry, the shoulder and winter seasons need to be developed and enhanced. Under these two seasons a number of development opportunities exist and have the potential of increasing overall visitation, length of stay and tourism revenues. Likewise, quality will be a part of every initiative we undertake.

In addition to the three priority experience areas being used to establish year one actions for the development plan, there are a number of product enhancers or other priority actions that don't necessarily fit within the three stated priority experiences. These training, influencing and advocacy actions clearly run through the entire plan and are critical to achieving the objectives of the Product Development Plan and the overall objectives of the Tourism Strategy. For the initial year of 2002, an

action plan has been created for each priority by identifying specific initiatives for implementation, potential partners, timing, status and measurement. The priorities outlined will not remain constant. An annual review and evaluation of the action plan will be completed to determine the priorities for subsequent years and encourage stakeholders to identify opportunities, take a lead role and implement specific actions. This will ensure the tourism industry as a whole will have the opportunity to work together toward its common goals.

A. AUTHENTIC SEACOAST EXPERIENCE

Nova Scotia is Canada's foremost seacoast vacation destination that offers our visitors an authentic and memorable experience. With over 7400 kilometers of coastline, at no point are you more than 56 kilometers from the sea. It is the sea that influences who we are and how we live. Only Nova Scotia uniquely combines spectacular coastline and scenery, maritime culture and hospitality, an array of attractions and living traditions that help shape us into a tourism destination like no other.

1. Develop attractions and activities which focus on history/heritage and seacoast themes:
   - Re-establish the Bluenose II as a provincial tourism icon.

2. Enhance the seacoast experience by further developing natural sites, attractions and activities:
   - Continue to support Product Club Programs, ie Bay of Fundy and Atlantic Lighthouse Council.
   - Enhance Bay of Fundy product mix by implementing initiatives identified in the Fundy Development Plan.
   - Develop and enhance our coastal hiking/walking trails.
   - Develop increased coastal access and preservation of the marine environment, lighthouses and beaches.

3. Improve customer service and the quality of Nova Scotia product destinations, operations and communities:
   - Design and implement market-readiness enhancement programs.
   - Identify and develop "Best Business Practice" opportunities.
   - Support operators to attend "Best Business Practice" initiatives.
   - Identify and support coastal communities for participation in a Sustainable Communities Program.

4. Establish policy task forces to examine issues:
   - Coastal access
   - Peggy's Cove Capacity

5. Evaluate the existing travelway and scenic drives system throughout Nova Scotia from a visitors' perspective, and how it impacts/enhances the coastal experience.

B. CULTURE AND HERITAGE EXPERIENCE

A number of opportunities were identified based on the culture and heritage for which Nova Scotia is best known. Nova Scotia is steeped in culture and its four hundred-year history, with its numerous settlers from varied backgrounds have given us unlimited possibilities. Nova Scotia offers exciting and

engaging history, from prehistoric fossils to our diverse cultural heritage to the natural wonders of our land and sea. Culture addresses the beliefs, customs, arts and institutions of a society at a given time and heritage deals with culture as it is passed down from generation to generation.

1. Improve the physical quality and expand seasonal opportunities of existing attractions:

   • Develop programming, demonstrations, participatory experiences, and increase educational and interpretive opportunities that will expand the season.
   • Implement a "living history" program at historic sites, museums, communities which bring alive its historical seacoast significance.
   • Create new strategic product mixes (eg. theatre in museums, artistic activities in natural settings).

2. Work with the Acadian community to establish priorities for development and marketing:

   • Clarify roles and mandates of the various organizations.
   • Develop and prioritize programming, demonstrations, participatory experiences and increase educational and interpretive opportunities.
   • Continue to support the Acadian Tourism Product Club under the brand of L'Acadie.
   • Work with Acadie 2003-2005 Committee to ensure planned activities are market ready.

3. Identify and develop products for extended season.

4. Identify and develop new and emerging niche product strategies for Cuisine and Wine.

5. Improve the tourism working relationship with cultural and heritage communities.

C. OUTDOOR NATURE EXPERIENCE

Nature lovers enjoy the beauty and variety of Nova Scotia's outdoor experiences. From the scenic views of the Cabot Trail to the hiking trails of Cape Chignecto to wilderness camping in Kejimkujik National Park, Nova Scotia offers something for everyone. Our outdoor product is a vital part of how we position ourselves in the global market.

1. Enhance the outdoor nature experience by further developing natural sites, attractions and activities.
   • Develop and enhance birdwatching opportunities.

2. Establish a policy task force to examine the natural resource management issue.
   (eg. Clear cutting, integrated resource management)

3. Develop the province as a pre-eminent fall foliage touring destination.

4. Develop a viable niche product strategy for the outdoor nature product.

D. PRODUCT ENHANCERS

In addition to the three priority experience areas being used to establish year one actions for the tourism development plan, there are a number of other priority actions that do not necessarily fit within these stated experiences. These training, influencing and advocacy actions clearly run through the entire plan and are critical to achieving and enhancing the objectives of the Product Development Plan and the overall objectives of the Tourism Strategy. In some cases, the following actions will be addressed by other Tourism Partnership Council committees or Task Forces or other tourism groups.

1. Improve visitor satisfaction.
   - Continue the delivery of service excellence programs (eg. SuperHost - English, French) for front-line staff.
   - Develop an integrated Visitor Information Services Strategy which addresses all aspects of visitor information services from a customer and quality services perspective.
   - Support the development of an implementation plan for the ACTP visitor satisfaction research project.

2. Extending lengths of stay by extending hours of operation and length of season at museums, parks, attractions, VIC's and businesses.

3. Implement a Nova Scotia "TradeSmart" program to evaluate and certify tourism operators who conduct best business practices with the travel trade.
   - Develop training and mentoring programs focusing on market-readiness (eg Introductory "Marketing 101", Adventure Tourism, Community Tourism Planning).

4. Improve air access to Nova Scotia from our core and developing markets.

5. Expand and promote Halifax International Airport as an international gateway to Canada.

6. Influence the federal government to change the transport policy to allow international air carriers to fly into Halifax.

7. Ensure accurate information for measuring tourism impact.
   - Collect and distribute, accurate and timely information on the economic impact and performance statistics.
   - Communicate the value of tourism to government, industry, the public, communities and municipal units.

8. Enforce standards of quality for tourism facilities (fixed-roof accommodations and campgrounds) in order to meet and exceed visitors expectations.

9. Offer "Best Practices" seminars on how to use technology for improved guest relations, accounting and financing.

Who are we — a brief overview

In 1996, there was a genuine commitment to rethinking how government and industry worked together to strengthen the Nova Scotia tourism industry. This acknowledgment coincided with the conclusion of an extensive consultation led by a partnership of Voluntary Planning, Tourism Industry Association of Nova Scotia (TIANS), Atlantic Canada Opportunities Agency (ACOA) and the Nova Scotia Department of Economic Development and Tourism. This resulted in the *1996 Tourism Strategy for Nova Scotia.*

- The industry, led by people who worked on the strategy and the Tourism Industry Association of Nova Scotia approached government about reformulating how we work together. Ultimately, there was a recognized need for joint decision-making in critical areas affecting the industry's bottom line.

- Following consultation, a new partnership was formed, resulting in the Tourism Partnership Council, whose overall mission is to work co-operatively to bring more visitors into Nova Scotia and increase the amount of money those visitors spend.

- The partnership has 16 members drawn from across the province. Seven were chosen to create a geographic balance; seven more were selected provincially; and two members represent government. All were appointed for a two-year period (effective May 1998) from a list of applicants obtained through a public call and based on recommendations from an industry-led selection committee.

- The partnership's mandate is to direct the planning and delivery of provincial tourism marketing and product development programs. In doing so, the partnership enables industry and government to share decisions, responsibilities and resources. Ultimately, a new partnership has meant:
  - true industry participation in the decision-making process; and
  - a better integration of government-industry programs that reflect industry priorities and create greater effectiveness.

- Funding for the Council's activities is supplied through provincial sources already dedicated to tourism, as well as by private sector contributions through investment in marketing partnerships. The Council is staffed with existing employees at Tourism and Culture. Two people perform secretariat functions, with additional support for Council committees provided by the staff of the Tourism Division of the Department of Tourism and Culture.

- The Department of Tourism and Culture now undertakes initiatives based on the **Council's vision, which is to realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians.**

- In November 2000, the Council was advised that the Nova Scotia Tourism Partnership Council had been formalized and the reference to the "pilot" had been removed.

2001 Tourism Partnership Council Members

- **Chair Paul Stackhouse,** general manager, Holiday Inn Harbourview, Dartmouth; chair, Tourism Strategy Implementation Committee; president, Hotel Association of Nova Scotia (HANS); board member of Greater Halifax Conventions and Meetings Bureau; member of TIANS and board member of Canada Select.

- **Vice-Chair Bill Hay,** owner, Mastodon Ridge and Showcase Nova Scotia, Stewiacke; past president, Central Nova Tourist Association (CNTA), and board member of TIANS.

- **Past Chair, Doug Fawthrop,** managing director, White Point Beach Resort, Liverpool; past president, South Shore Tourism Association (SSTA); past chair, Canada Select Nova Scotia; member, Air Accord Working Committee and a member of the Hotel Association of Nova Scotia

- **Marsha Andrews,** executive director, Tourism Division, Department of Tourism and Culture, member of the Hotel Association of Nova Scotia; and board member of the Greater Halifax Conventions and Meetings Bureau.

- **Nicholas Carson,** general manager, Prince George Hotel, Halifax, Nova Scotia; founding president of the Hotel Association of Nova Scotia; two-term director of TIANS; and chair of the Greater Halifax Conventions and Meetings Bureau.

- **Charles Clerk,** founder and president, Island Beach Company (with over thirty locations in five provinces), Truro, Nova Scotia; and member of TIANS.

- **Stefi Davies,** owner, Yogi Bear's Holiday Haven Camp Resort, Kingston, Nova Scotia; member of Evangeline Trail Tourism Association; member of Campground Owners Association; and member of TIANS. (resigned March 2001)

- **Donald Gunn,** operator and president, Stonehame Farm Ltd., Scotsburn, Pictou County, Nova Scotia; owner of Stonehame Chalets, Fitzpatrick Mountain, Nova Scotia; (resigned August 2001)

- **Irene Khattar,** owner, Irene Khattar & Associates, Sydney, Nova Scotia; Marketing Consultant, Highland Links and Golf Nova Scotia; and member, Tourism Cape Breton.

- **Patricia Lyall,** regional director of Sales and Marketing - Atlantic Canada, Delta Hotels, Halifax, Nova Scotia; board member of the Greater Halifax Conventions and Meetings Bureau and member of the Atlantic Canada Tourism Partnership U.S. Committee.

- **Scott MacAulay,** owner and operator, Inverary Resort, Dundee Resort, Ceilidh Country Lodge and Glenghorn Beach Resort, Cape Breton, Nova Scotia; partner, Bell Bay Golf Club and the Highland Heights Inn; and past chair, Tourism Cape Breton.

- **Doreen Malone**, general manager, Neptune Theatre, Halifax, Nova Scotia.

- **Doug Matthews**, director of Quality Services and Signature Resorts, Department of Tourism and Culture. (appointed September 2001 to fill the second government position).

- **Kim McCallum**, owner, Scotia Pine Campground Ltd., Truro, Nova Scotia; member, Central Nova Tourist Association, member of TIANS; and member, Campground Owners Association of Nova Scotia.

- **David Miller,** owner, McDonald's Restaurants in Antigonish and Port Hawkesbury; member, Planning Advisory Committee for the Town of Antigonish and Tourism Sector of Voluntary Planning.

- **David Oxner,** executive director, Tourism Division, Department of Tourism and Culture and member of the Hotel Association of Nova Scotia. (until March 2001)

- **Wendy Scott**, owner and president, Scott Walking Adventures, Halifax, Nova Scotia; vice president, Nova Scotia Adventure Tourism Association.

Council Staff

- Peggy Tibbo-Cameron
- Cathy Kalil

Recognition of Previous Council Members

The Tourism Partnership Council would like to thank the following Council members who previously served on the Council:

- **Peggy Anderson**
- **Stefi Davies**
- **Victor Ferreira**
- **Donald Gunn**
- **Lou Leith**
- **Michele McKenzie**
- **Ella McQuinn**
- **Eric Mullen**
- **David Oxner**
- **Brian Rodney**
- **Raymond Tudor**
- **Karl Webb**

Tourism Division Staff
Nova Scotia Tourism and Culture

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Irene Crocker, Administrative Assistant
Dianne Kean, Admin./Budget Coordinator

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Paula Richards, Publications' Assistant
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Kendra Decoste, Quality Services Officer
Sheila Deveaux, Quality Services Officer

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Cindy Wade, Marketing Officer

Tourism Development
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Carol Longard, Administrative Assistant

Visitor Information Services
Sharon Martin, Manager
Olivia Ross, Administrative Assistant
Lisa MacIsaac, Training & Development Officer
Angela Capstick, Visitor Services Assistant
Sadie Thomas-Frye, Supervisor, Portland

Publications

The following is a list publications which may be of interest to the tourism industry.

- Nova Scotia Integrated Tourism Plan 2002
- Nova Scotia Integrated Tourism Plan 2002 - Video
- 2002 Partnership Opportunities Book
- Tourism Product Development Annual Plan (2002-2003 Product Priorities)
- Nova Scotia Tourism Product Development – Long-Term Plan
- Nova Scotia Tourism Strategy
- The Business Case for Growing Tourism In Nova Scotia
- Nova Scotia Product Market Match Study
- Vision Information Services Report
- Tourism Business Development Guides
- Tourism Facts Flash (bi-monthly)
- Tourism Insights (monthly)

For information on receiving any of these publications, please visit the Tourism Partnership Council web site.

Contacting the Council

For more information on the Nova Scotia Tourism Partnership Council, contact:

- Peggy Tibbo-Cameron
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